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28 February 1958

MEMORANDUM FOR: Chief, Projects and Procedures Staff

SUBJECT: Fitness Reports

1. Attached is headquarters Section 5, Fitness Report, of Chapter III, Assignment and Development, of the proposed personnel manual.

2. In accordance with your instructions, the tear-sheet attached to the fitness report form is regarded as taking the place of the procedural handbook.

3. This draft has received working-level coordination with the office of DD/Pers/PD, which expressed interest in obtaining a draft revision of for a "pilot run" next month of the proposed new fitness reporting schedule. For this reason, such a draft revision is also attached.



Attachments: 2

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5. FITNESS REPORT

The Agency will evaluate the work performance and effectiveness of each staff employee and staff agent at least once each year. Initial, annual, reassignment, and special fitness reports will be made on Form 45, of which a sample is attached. However, an evaluation in memorandum form may be substituted for Form 45 for employees in grades GS-14 and above.

It is Agency policy that employees be informed concerning the effectiveness of their work. The annual fitness report will be shown to the employee concerned at the time it is completed except that the supervisor may elect not to show the report, other than a report supporting an adverse action, when one or more of the following conditions prevails:

- When there exist unusual operational circumstances such as those at a small station where the employee and the supervisor evaluating his performance are working and living in very close proximity and constant social interchange between them is necessary;
- When, for medical or psychological reasons, it would be ill-advised to show the individual the report;
- When security considerations preclude showing the report;
- When the supervisor and the employee are so physically separated that it is impracticable to show the report.

When the report is not shown to the employee, the supervisor will state his reason on the report. Final determination regarding the showing of

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the report will be made by the head of the career service concerned.

Operating Officials will direct the preparation, review and forwarding of fitness reports concerning personnel under their jurisdiction. Heads of career services will review fitness reports as they pertain to career management of members of their respective services. The Director of Personnel will periodically review the effectiveness of this evaluation program and will control and maintain central fitness report records.

Initial Report

A fitness report will be prepared for each employee 9 months after his entrance on duty. This report is of particular importance in providing a record of the supervisor's evaluation of the employee before the completion of his 12-month trial period. The Office of Personnel will furnish to the administrative or personnel officer of each major component, on or before the 15th day of each month, a list of the headquarters employees for whom an initial report will be due within the next 30 days. An initial report may be deferred for a period not to exceed 30 days beyond the due date to provide the supervisor with additional time to evaluate an employee who has been under his jurisdiction less than 90 days.

Annual Report

A fitness report will be prepared annually for each employee, except when an initial, reassignment, or special fitness report has been made within 90 days of the annual report due date. An annual report may be deferred until the employee has been under the jurisdiction of the supervisor 90 days.

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Schedule for the Submission of Annual Reports

<u>Grades</u>	<u>To Be Received in Office of Personnel By</u>
GS-01 through GS-06	30 June
GS-07 through GS-10	30 September
GS-11 and GS-12	31 December
GS-13 and above	31 March

Reassignment Reports

A supervisor who is to be reassigned or who is leaving the Agency will, before his departure, prepare fitness reports on the individuals under his immediate supervision. When the interval since an employee's last fitness report has been less than 90 days, the new report may be a memorandum confirming the previous evaluation.

When an employee is to be reassigned, a fitness report concerning him will be prepared unless such a report has been prepared for some other purpose within 90 days. In the latter event, the new report may be a memorandum confirming the previous evaluation.

Special Reports

A fitness report will be prepared whenever necessitated by a particular circumstance, such as a proposed action based on extraordinary merit, or completion of a short detail, a special assignment, or a probationary period.

Routing of Reports

Fitness reports will be forwarded by the supervisor and the reviewing official through the head of the career service in time to reach the Office of Personnel in triplicate before the due date.

Reports of Unsatisfactory Service

A fitness report expressing the opinion that an employee should be separated or judging him to be incompetent will be accompanied by a warning memorandum notifying him of his deficiencies in performance.

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FITNESS REPORT

Rescission: [] dated 21 January 1956

1. POLICY

- a. The Agency will evaluate the work performance and effectiveness of each staff employee and staff agent at least once each year.
- b. Initial, annual, reassignment, and special fitness reports will be made on Form 45, of which a copy is attached. However, an evaluation in memorandum form may be substituted for Form 45 for employees in grades GS-14 and above.
- c. It is Agency policy that employees be informed concerning the effectiveness of their work. The annual fitness report will be shown to the employee concerned at the time it is completed except that the supervisor may elect not to show the report, other than a report supporting an adverse action, when one or more of the following conditions prevails:
 - (1) When there exist unusual operational circumstances such as those at a small station where the employee and the supervisor evaluating his performance are working and living in very close proximity and constant social interchange between them is necessary;
 - (2) When, for medical or psychological reasons, it would be ill-advised to show the individual the report;

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(3) When security considerations preclude showing the report;

(4) When the supervisor and the employee are so physically separated that it is impracticable to show the report.

d. When the report is not shown to the employee, the supervisor will state his reason on the report. Final determination regarding the showing of the report will be made by the head of the career service concerned.

2. RESPONSIBILITIES

a. Operating Officials

Operating Officials are responsible for directing the preparation, review and forwarding, in accordance with this regulation, of fitness reports concerning personnel under their jurisdiction.

b. Heads of Career Services

Heads of career services are responsible for review of fitness reports as they pertain to career management of members of their respective services.

c. Director of Personnel

The Director of Personnel is responsible for periodically reviewing the effectiveness of this evaluation program and for the control and maintenance of central fitness report records.

3. TYPES OF REPORTS

a. Initial Report

A fitness report will be prepared for each employee 9 months after his entrance on duty. This report is of particular importance in providing a record of the supervisor's evaluation of the employee

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before the completion of his 12-month trial period. The Office of Personnel will furnish to the administrative or personnel officer of each major component, on or before the 15th day of each month, a list of the headquarters employees for whom an initial report will be due within the next 30 days. An initial report may be deferred for a period not to exceed 30 days beyond the due date to provide the supervisor with additional time to evaluate an employee who has been under his jurisdiction less than 90 days.

b. Annual Report

A fitness report will be prepared annually for each employee, except when an initial, reassignment, or special fitness report has been made within 90 days of the annual report due date. An annual report may be deferred until the employee has been under the jurisdiction of the supervisor 90 days.

Schedule for the Submission of Annual Reports

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GS-01 through GS-06	30 June
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c. Reassignment Reports

- (1) A supervisor who is to be reassigned or who is leaving the Agency will, before his departure, prepare fitness reports on the individuals under his immediate supervision. When the interval since an employee's last fitness report has been less than 90 days, the new report may be a memorandum confirming the previous evaluation.

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(2) When an employee is to be reassigned, a fitness report concerning him will be prepared unless such a report has been prepared for some other purpose within 90 days. In the latter event, the new report may be a memorandum confirming the previous evaluation.

d. Special Reports

A fitness report will be prepared whenever necessitated by a particular circumstance, such as a proposed action based on extraordinary merit, or completion of a short detail, a special assignment, or a probationary period.

4. ROUTINE OF REPORTS

Fitness reports will be forwarded by the supervisor and the reviewing official through the head of the career service in time to reach the Office of Personnel in triplicate before the due date.

5. REPORTS OF UNSATISFACTORY SERVICE

A fitness report expressing the opinion that an employee should be separated or judging him to be incompetent will be accompanied by a warning memorandum notifying him of his deficiencies in performance.

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